Book of Business Quick Guide
Certified Insurance Agents

Book of Business

A weekly Book of Business report is available for your use on your Agent Extranet Account (click here for instructions on how to access your Extranet Account). The report is generated from the online application accessed via CoveredCA.com, also known as CalHEERS. Your book of business file is updated to your Agent Extranet account every Monday by close of business.

The Book of Business reflects consumer data from the week prior on Friday at 3pm. Any changes made after 3pm the previous Friday, of the current week's Book of Business, will not be reflected until the following week's Book of Business.

The Book of Business is provided as an Excel document, which allows you the flexibility to sort, manipulate and maintain client data. The Book of Business contains Covered California, Mixed Household and Medi-Cal members.

Personally Identifiable Information (PII)

PII is found within the Agent Extranet and must remain secure and confidential in accordance with Covered California's Security and Privacy policies as outlined in the agent agreement, including all applicable laws and regulations. It is the Agent's responsibility to ensure that they handle this information in the appropriate manner. Remember that emails with consumer PII must be encrypted or secured.

Understanding the Book of Business Report

The chart on the following page provides a description of the fields found within the Book of Business. **Please note:** If the information is not applicable or not provided, the data under each column will be blank.

-See Chart Below-

Content	Field Description
Full Name & Date of Birth	Consumer first, middle, and last name and consumer's birthdate.
Contact Information	Address, email, and home phone number
Customer have account (Y/N)	Agents can create cases for consumers without the consumer actually creating an online account. Y – if the applicant has a user account to log into the application, N – if the applicant does not. The access code generated upon submission of the application allows the consumer to later create a new account and link that account to their existing case in the system.
Case ID	Covered California Case ID number for that applicant.
Application ID	Covered California Application ID number.
Application Status	The status of the application (i.e. In Progress, Submitted, Withdrawn, Terminated).
Enrollment Status	The status of the enrollment (i.e. Pending, Enrolled, Canceled, Aborted, Withdrawn, Terminated, Payment Received).
Case Status	The status of the case (i.e. active, inactive).
Carrier Name	The name of the carrier the member selected.
Plan Type	The type of plan which is selected (i.e. Medical or Dental).
Medi-Cal Eligibility Status	The member's Medi-Cal eligibility status.
Plan Level	The metal level of the plan selected.
Plan Name	The name of the plan selected.
Plan Effective Date	The date that the coverage of the plan starts.
Termination Date	The date the applicant ends coverage.
Income Used to Calculate APTC	The income amount used to calculate APTC.
Number of Enrolled Members	The number of household members enrolled.
Old APTC	The APTC amount for the member before being renewed.
Old Gross Rate	The total amount owed by the member before being renewed.
Renewal APTC	The APTC amount for the member who's coverage has been renewed.
Federal Consent Flag/Indicator	Consent from the applicant for Covered California to electronically verify their information. If flagged they are stating that they understand that their information will be used for verification purposes.
Years of Consent	The number of years the applicant provided consent to using their information for verification purposes.
Date of Consent	The date that the consent was provided by the applicant to use their information for verification purposes.